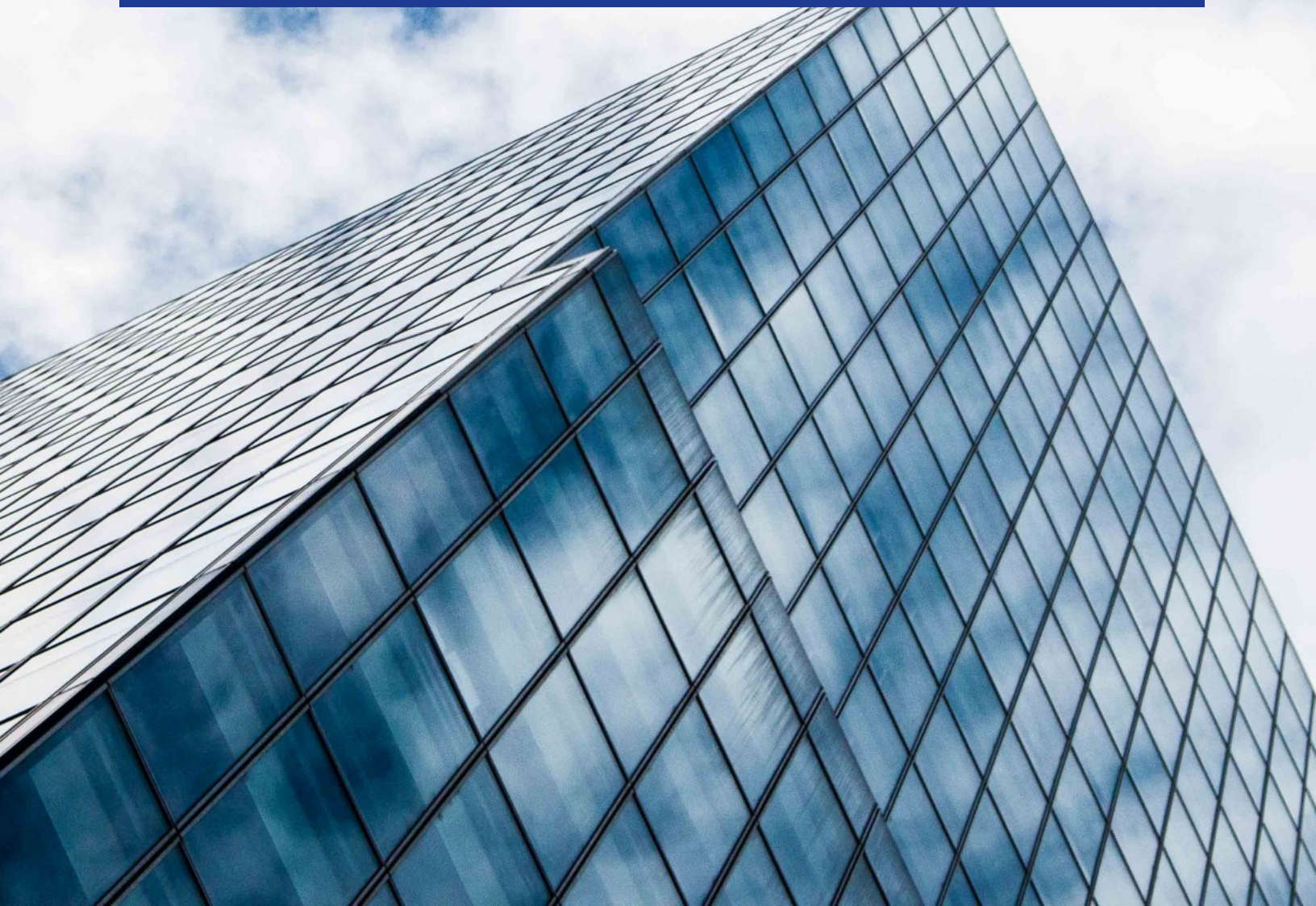


# Where is KM Going?

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# Where is KM Going?

## Introduction

**History is a puzzle** comprised of many interrelated pieces often provided by eye witnesses. The nature of each individual's contribution often depends on that person's personal experiences and perspectives, even prejudices. This chapter is one person's own individual perspective on the evolution of knowledge management (KM) from 1995 to the present. Someday, someone will compile a large sampling of such perspectives and viewpoints and we will have a more complete and possibly accurate history of KM's startup.

But, more important at the moment than a history of KM's startup is the question, "Where is KM going?"

Where KM is going will of course be based somewhat on where it's been (its roots), and what technology disruptions are going to shape its ultimate future. e.g., robots, drones and artificial intelligence. Hence, this chapter briefly addresses where KM has been, and then especially focuses on some ideas about where KM is going.

The chapter is in two parts: the first is one perspective on where KM has been, by a person who has been in KM since its very beginnings (1995); and then six different, emerging threads that will no doubt enrich the fabric of future KM.

These threads include: 1) a shift from traditional repositories for content management to much more granular knowledge housed in process-oriented **knowledge bases**; 2) emergence of robust **KM methodologies**, not just ad hoc frameworks and roadmaps; 3) the emergence of **advanced maturity models** as powerful business improvement tools, that are more than just diagnostic assessments, but prescriptive tools as well; 4) attempts to define KM by **competency areas** to enable the development of university curricula and help to establish KM as an actual discipline – diplomas being awarded; 5) increased consideration of KM as not just another improvement discipline, but in fact the instigator and enabler of the requisite major transformation by organizations to operate highly effectively in the next episodic event, the Knowledge Age; and finally, 6) a major shift from KM technology solutions, such as repositories, to a focus on human performance in the Knowledge Age.

# Where is KM Going?

**Let me tell you a story about KM** in the mid- to late-1990s as I experienced it. In 1994, I was a consultant at a U.S. Department of Defense (DoD) think tank focusing on Business Process Reengineering (BPR) and Financial Analysis. DoD is a leader in seeking out ways to improve huge enterprises and it had focused on BPR from the very beginning (about 1992). By 1994, it was determined that despite the potential, DoD's BPR success was mediocre at best. So, DoD commissioned a study group of 30 top consultants from some of the best consulting firms in the Washington, DC area (including a few of the think tanks), to uncover the causative problems and to make specific recommendations.

One of the primary conclusions was that BPR lacked a robust, proven methodology. For instance, most existing BPR methodologies at the time didn't include much about change management or strategic planning. So, we invested much time creating a robust BPR Methodology. At the end of the study, it was determined that the methodology should be published and distributed to all BPR vendors. I was asked to publish the methodology as a representative of a neutral think tank. The publishing assumption was it should be a typical, hard-copy procedure manual.

But, I had a personal bias against procedure manuals. That's another story, but here it is in a nutshell. I graduated from the U.S. Air Force Academy, where the frequent updates of the Cadet Manual was one amongst many discipline training efforts. Such cadet manuals didn't need many changes, they had been around since West Point (U.S. Army) was founded in 1802. The changes were less on substance than 'probably' just to make sure each cadet learned to be disciplined in all things. I saw through the effort, whether my interpretation was right or not, who knows? But, that experience made me biased against hard copy procedure manuals. So, I started to lobby for an alternative, an electronic procedure manual – obvious today, but quite radical in 1994. The primary argument was: "You can't depend on thousands of admin folks to remove/replace the many changes that would be necessary to continuously enrich the initial manual." Also, think how many trees could be saved.

When the e-manual was completed, it satisfied the Knowledge-Age imperative to 'get the best knowledge to the right person at the right time', which could easily be the KM mantra. But in 1995, KM was definitely and primarily about repositories, and to a lesser extent, expert locators. (See Davenport, DeLong, and Beers - Working paper, 1997, based on 31 projects in 23 companies.)

Here's why. To be successful a new discipline needed active sales efforts, which could be justified and provided if the result was a multi-million dollar sale. In those days, multi-million dollar sales were possible if the product was the licensing and installation of an enterprise-wide system, i.e., a repository.

Here's a typical late-1990s KM consultant strategy, which continues to the present. Make inroads into an organization on the basis of their potential interest in the "new thing" (KM) and eventual organizational improvement possibilities, which is the chief executive's primary objective.

# Where is KM Going?

In truth, in the late 1990s, it would have been almost impossible for a solo KM consultant to survive, unless they could be the spear point to an eventual big system sale (the shaft of the spear). That typically meant being a consultant within an IT consultancy, which is exactly what I was. Truthfully, it was hard for such a consultant to cover their costs with billable hours, so many of us often incurred many overhead hours, which should have been more accurately allocated to marketing expense than overhead. I recall one \$325 million NASA contract that was awarded to us, according to the government contracting officer, who essentially said, “Most all proposals documented great capabilities, but only your firm touted KM in response to our request for innovation.” I knew my “KM for Rocket Scientists” lectures had helped earn my keep that year.

So, while I saw the power of repositories, I believed process-oriented KBases were the ultimate “KM End Game.” But that insight was an overstatement, as many other initiative types were emerging by 2000. It was also pre-mature as the emphasis was clearly on repositories. See more on granular, process-oriented KBases below, #1 in “Where is KM going?”

Back to the late 1990s. KM repositories, could be labeled ‘Collect’. More precisely, the collection was explicit documents in a repository. Also, some additional KM methodologies started to emerge, e.g., Amrit Tiwana Knowledge Management Toolkit, 2000, which could be dubbed *KM (as a) System Approach*.

**Early 2000s.** By 1999, the US Civilian Government (and many others around the world) were getting very interested in KM, but many were aware of both the mediocre success of 1990s KM, and the growing movement toward the sharing of tacit knowledge (e.g., Expert Locators, CoPs, Knowledge Cafés, etc.) as opposed to a prior focus primarily on explicit information and knowledge. That movement was strong enough that many in the U.S. government even suggested changing the name of KM to *Knowledge Sharing (KS)*.

I definitely believed KS was a key KM scope expansion. For instance, in 1999 I coined a label for the KBase while consulting to the United Nations, which I called *Connect & Collect*. Where collect was the KBase content, possibly created by experts. But if that content fell short of an individual’s needs, connect was pointers to experts who might assist. Conversely, some KBases might be originally compiled by conversations amongst experts, and if collected, could be the KBase for future practitioners.

So as a member of various government advisory committees, here’s what I suggested based on my first-hand knowledge of the KM marketplace. Many software vendors and consultants were committed to KM as a system, and would be reluctant to change that global focus, just because the US government thought KS should pre-empt KM. I also asked, if KM is called KS, what about knowledge creation? Do we ignore the creation of new knowledge in favor of just focusing on existing, sharable knowledge? In my experience, that would ultimately be a big mistake.

# Where is KM Going?

The KM name was never changed, but it did indicate a post 2000 transition to much more focus on connect and conversations vs. just documented explicit knowledge. Nancy Dixon, another early KMer, defined *Three Eras of KM* in 2012. She generally agrees with above, but from her different perspective as an academic and consultant. She defined the late 1990s as “Collection” and 2000 thru 2010 as Connection. But by 2010, she was focusing further on Conversation, especially for *Idea Management*. Her descriptions are noteworthy, and I recommend studying her works at [www.commonknowledge.org](http://www.commonknowledge.org). So, according to Dixon, conversations will be the next wave. I have a somewhat different perspective going forward, as I always thought the earlier ‘Connect’ era was about conversations. Dixon seems to be focusing on much more structured conversations and she is right. For instance, wouldn’t a conversation between a retiring expert and successors be different than a brainstorming or training session?

As for Idea Management, aka innovation, that will no doubt be a critical factor going forward as well. Based on my above arguments against KS vs. KM, I certainly and whole heartily agree with Dixon’s bias toward innovation.

But, looking forward beyond structured conversations and Idea Management, our predictions diverge somewhat, probably not in common understanding of KM, but on its future emphasis. Nancy Dixon seems to be focusing on extending the techniques of idea management through improved conversational techniques. Based on my different orientation – certification training and consulting in process improvement, I derived a different view going forward.

Primarily, I think the future of KM will be less about just traditional KM – a few enterprise systems or techniques, than ultimately about the emerging tools and techniques to gain the advantages of untapped human potential. At the KM Institute, this initiative is called Personal Knowledge Management. Organizations must leverage a new class of high-performing Knowledge Workers as enablers of their requisite organizational transformation, to survive and prosper in the Knowledge Age.

Some additional post-2020 techniques that I see are described below. These predictions are of course based on my own personal KM perspectives, but my confidence in all the below has continue to grow. In the context of “if and when”. I am very confident that ‘if’ is not an issue, just ‘when’.

## **Where is KM going? Summary of Six Predictions.**

Though an understanding of where we have been is very helpful, it is more important to answer the question, “Where is KM going?” KM is certainly going to be based on where it’s been (its roots), but must be understood in the context of what disruptions are going to shape its ultimate future.

This section is in six diverse parts, which represent a sampling of the many emerging movements that in my considered opinion will define KM by 2020 and beyond, including:

# Where is KM Going?

1) **Performance Support** – I predict we will move from repositories as the primary content management source to much more granular knowledge, housed in decision support systems and process-oriented knowledge bases, such as complex processes or methodologies, especially when high turnover is a factor. Such a change will provide ‘Performance Support’. It will probably even revolutionize certain types of traditional organizational training, which will involve less classroom training and much more teaching on how to use and leverage KBase Tools and content to gain the best knowledge, but only when needed—aka ‘Just-in-Time’ learning vs. traditional ‘Just-in-Case’ learning.

2) **KM Methodology** – I predict we will move from ad-hoc frameworks and roadmaps, suitable for executive briefings and ‘calls to action’, to very robust KM Methodologies, which will become a requisite for successful KM.

3) **KM Maturity Models** – I predict robust KM Methodologies will enable us to move from ad-hoc maturity models to fact- or evidence-based models that are not just assessment (diagnostic) tools, but will likely become powerful, prescriptive tools for substantial performance improvement as well. And, perhaps unlike performance support, which will take a while to convince folks to think granular, immediately useful knowledge vs. documents, prescriptive maturity models could happen very soon.

4) **Defined Competency Areas** – I predict KM will mature from ill-defined, uncatalogued, and disparate KM efforts to defined KM competency areas. This will enable the development of more standardized university curricula, and for academics to be able to meaningfully organize the many already-proven KM Initiatives into a rich transformative discipline.

5) **KM as a Transformational Discipline** – I predict we will begin to consider KM as not just another improvement discipline (TQM, BPR, etc.), but in fact the instigator and major enabler of the requisite transformation necessary for organizations to operate effectively and be sustainable as viable organizations in the Knowledge Age.

6) **Human Capital vs. Technology Focus** – Finally, I predict major changes in future KM focus, with an increasing migration from technology-focused solutions e.g., the KM Systems Approach described above, to a much-needed focus on increasing human motivations and individual performance in the Knowledge Age.

## Where is KM going? Details of Six Predictions.

1) **Performance Support** – Process-oriented Knowledge Bases vs. Repositories as a “Collect” Tool.

Let me continue the story started in the intro. After my development of a KBase for BPR, I entered the KM fray thinking that KBases might eventually supplant traditional repositories—not for policies, regulations, statutes, and other traditional documents, but certainly for complex processes and methods, especially where turnover was high. I was reinforced in this belief when in 1997 I presented a keynote speech at the American Society for Training and Development. (*Knowledge Management - Concepts and Tools*, National Conference, American Society for Training and Development, May, 1997.) I was preceded by Gloria Gery who was promoting a concept called Performance Support (PS). Performance support evolved from Electronic Performance Support Systems (EPSS), which she wrote about as early as 1989.

# Where is KM Going?

She defined Performance Support as "...an integrated electronic environment that is available to and easily accessible by each employee and is structured to provide immediate, individualized on-line access to the full range of information, software, guidance, advice and assistance, data, images, tools, and assessment and monitoring systems to permit job performance with minimal support and intervention by others."

Unfortunately, I don't believe she had progressed much further than a solid concept, and especially gaining the passion to push for that concept against existing interests of the training folks that wanted to avoid any change—especially something as radical as Performance Support. When she saw my presentation, including actual examples of a KBase Tool, that did exactly what she defined as Performance Support, I recall she was ecstatic.

Here's what she saw. See Graphs 1 and 2. Her perspective gave me confidence that I was on the right track, but in KM we had our own vested interests, i.e., the enterprise repository advocates and vendors. But, finally many are beginning to see the need to dig deeper.

The screenshot shows a software application titled "Process Management Tool" with a menu bar (File, Edit, Activity, Window, Help) and a toolbar. The main window is titled "Create a Learning Organization - (WBS Edit)". On the left is a tree view of activities:

- A0 Create a Learning Organization
  - A1 Create the Knowledge Imperative
    - A11 Understand KM
      - A111 Understand KM Sciences
      - A112 Understand KM Processes
      - A113 Understand KM Techniques
      - A114 Understand KM Technology
      - A115 Benchmark Proposed KM Solutions
      - A116 Catalog Applicable KM Principles
    - A12 Perform Knowledge Audit
      - A121 Convene Kickoff Meeting
      - A122 Form Advisory Group & Audit Team
      - A123 Initiate Communications Plan
      - A124 Collect Enterprise Info
      - A125 Analyze/Map Results
      - A126 Deliver KM Audit Report
    - A13 Develop Vision & Performance Targets
    - A14 Develop KM Strategy
    - A15 Link Plans
    - A16 Get Buy-In
    - A2 Design/Justify KM Initiative**
      - A21 Perform KM Improvement Analysis
      - A22 Determine Functional Guidance & Tools
      - A23 Develop Milestone Plan and FEA
      - A24 Review/Approve Plan & FEA
    - A3 Implement/Manage Organizational Change
      - A31 Develop Change Strategies
      - A32 Build Change Management Project Plan
      - A33 Negotiate Support for Change
      - A34 Promote Change (process owner support)
      - A35 Perform Enterprise Engineering
      - A36 Implement KM Initiative
    - A4 Continuously Improve Operations
      - A41 Operate/Maintain Process and Info Systems

The right pane shows "Information about Activity A2" with fields for Label and Title (both "Design/Justify KM Initiative"). Below are sections for Description and Metrics. The Description text reads:

Whether a grass roots **KM Initiative** or a **Strategic KM Initiative**, this phase discloses the proper **methodology** to design and justify an initiative before large-scale implementation including the critical change management requirements of Phase III.

Unfortunately, grass roots KM initiatives are typically light on KM analysis and heavy on **technology** infusion, as if a silver bullet exists that will solve the organization's problems. Such initiatives often implement technology solutions without adequate design and implementation plans, especially the requisite change management needs. As a result, these KM solutions often don't provide the expected results, exceed budgeted costs, lose credibility and sponsorship, and are ultimately cancelled or collect dust. If that is not bad enough, the failed effort creates a distaste for needed KM that could have been successful if properly executed.

"The **process** owner, within which the initiative is to be launched, is the individual designated by the senior functional manager as responsible for engineering that initiative. The process owner is supported by persons with requisite **knowledge** and skills. Engineering an initiative or function involves the application of management and technical disciplines to design or redesign the organization's processes, organizational structure, and culture, through application of KM **methods**. The redesign approach can be either continuous process improvement or large-scale **innovation**, and may rely on the application of modern technology. The **output** milestone plan and functional guidance/tools are "templates" that

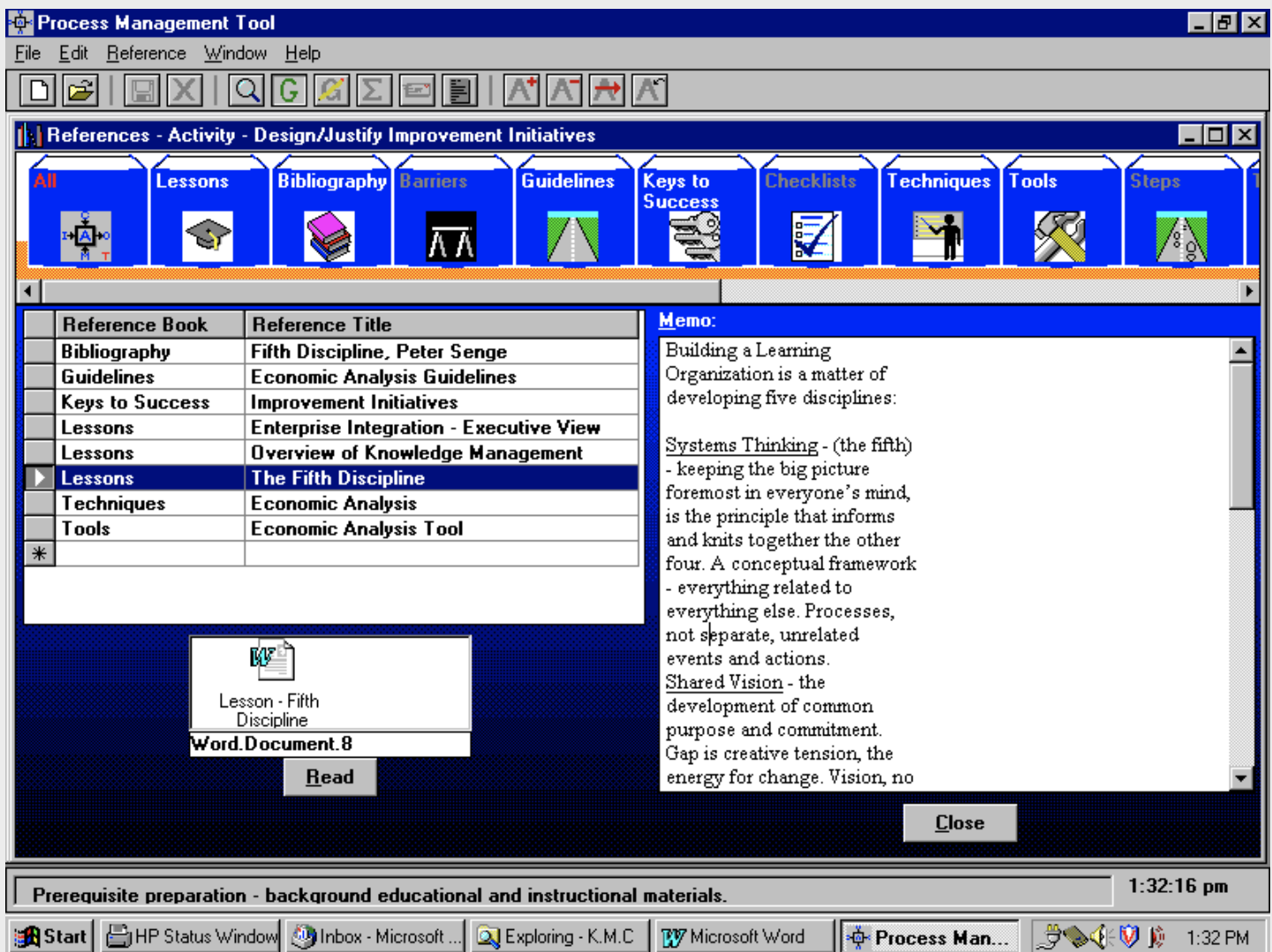
At the bottom of the right pane are "Save" and "Cancel" buttons, and a "0 References" indicator. Below the right pane is a status bar with the text "Work Breakdown Structure. Click to view activity information." and the time "12:47:08 pm". The Windows taskbar at the bottom shows the Start button, "PMT" icon, and several open applications including "Microsoft Word" and "Process Manage...".

# Where is KM Going?

**Graph 1.** First of two screen shots depicts the original KBase Tool, with initial KM Methodology.

This KBase design has three typical components that now seem universal, including an organizing scheme in the left-hand stub, and a description in the right-hand window, as seen in Graph 1. For a process-oriented KBase the categorization is typically a work breakdown structure (WBS) or roles. Each WBS activity has a corresponding description.

Obviously, the description is typically an insufficient level of knowledge, so the ‘References’ button is typically invoked. It leads to the ultimate knowledge objects or nuggets seen next below. (See Graph 2.)



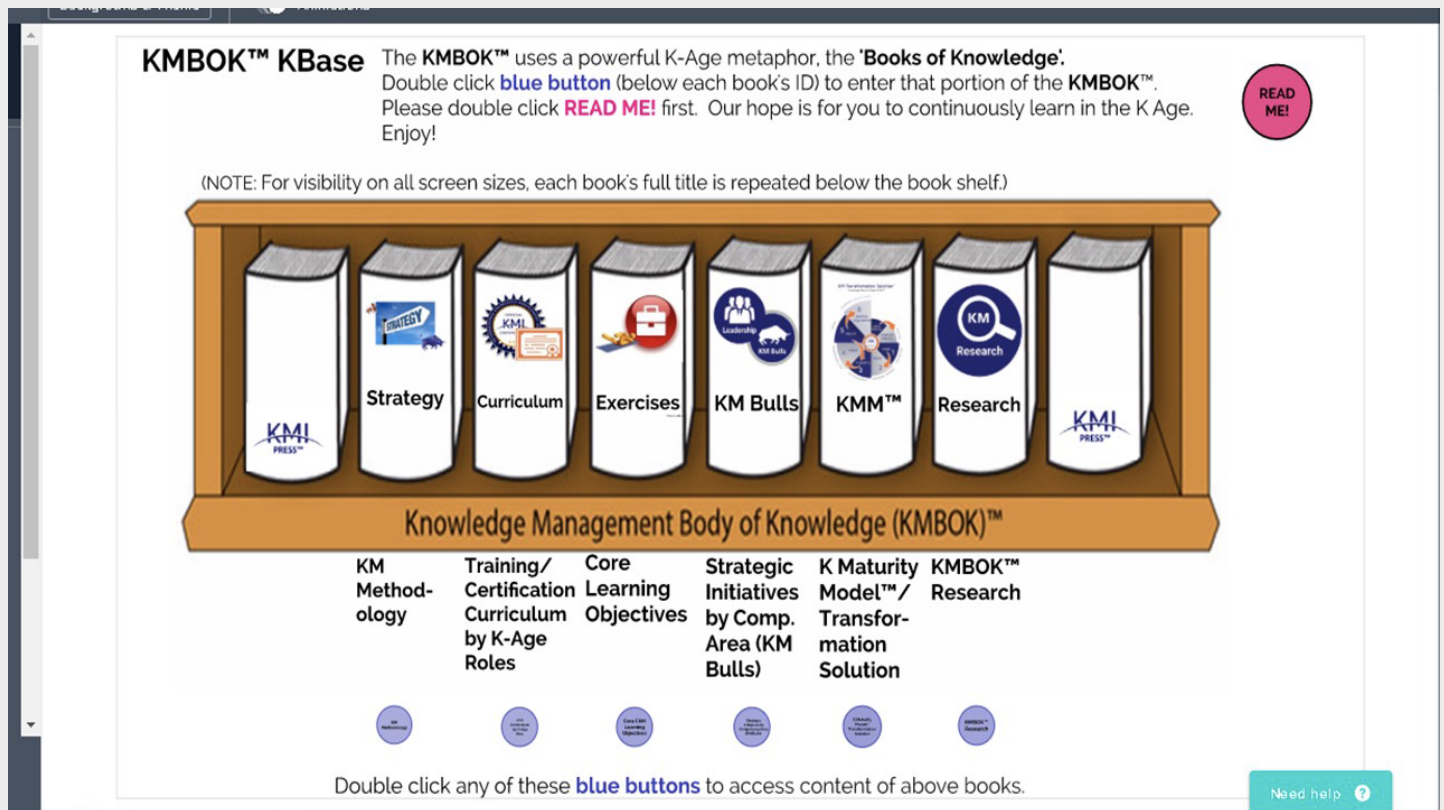
**Graph 2.** Second of two screen shots depicts the functionality of the 1995 version of the KBase Tool.



# Where is KM Going?

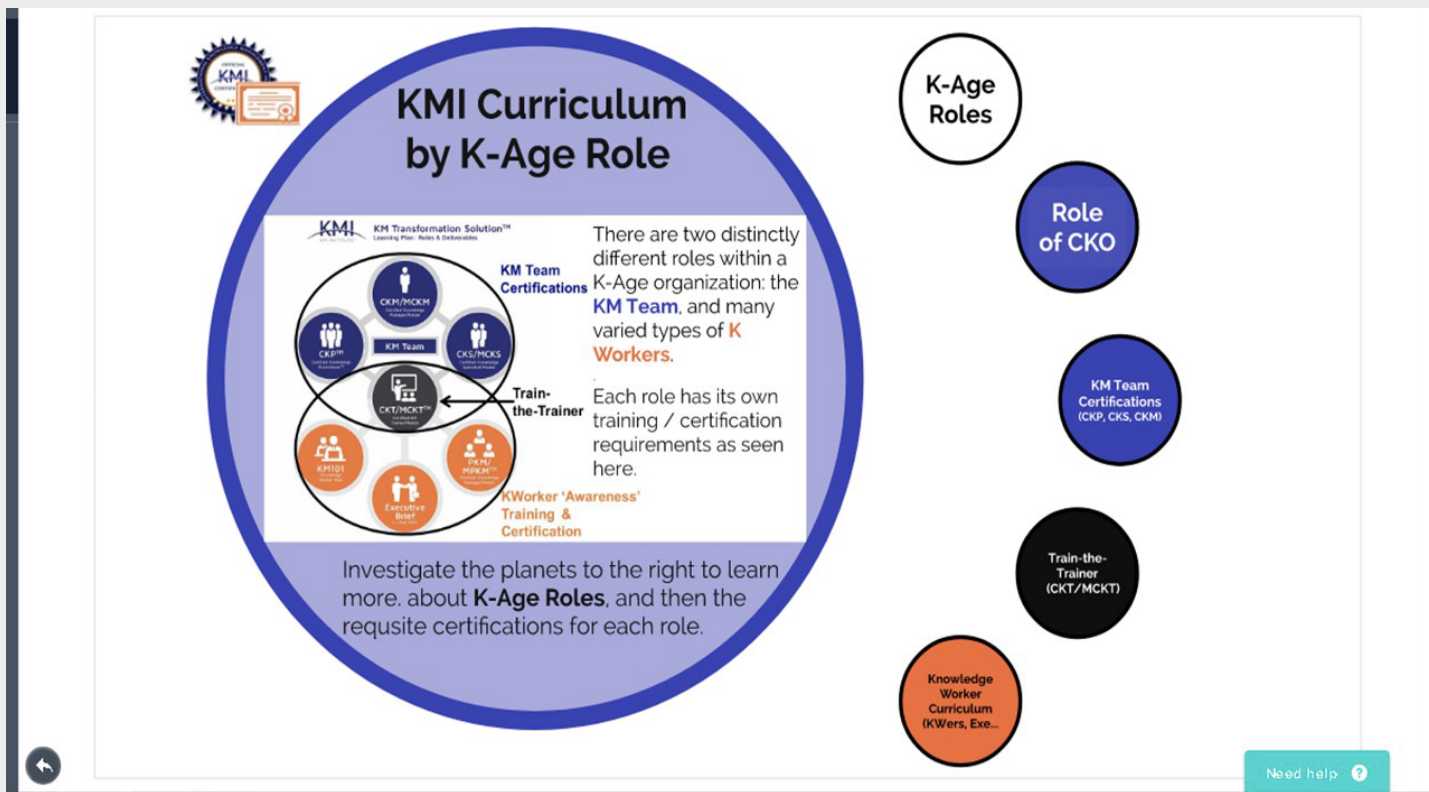
The critical third key feature includes the actual Knowledge objects themselves, depicted in Graph 2. using what I thought to be a creative ‘books of knowledge’ metaphor. Each book has a particular type of knowledge labeled with both a title and an icon. Icons have emerged to be the more powerful visual approach versus text labels. In 1995, I knew the emerging research, but using clip art icons didn’t seem fully adequate, so labels were added as well. The books were constant, but whether they had content varied. Grey scale books were empty.

Every variation of KBase I have seen since 1995 have included these three critical components: an organizing scheme (e.g., WBS or roles); a description of the selected activity; and, the ultimate knowledge nuggets.



Graph 3. Another ‘Books of Knowledge’ format for the KM Institute’s KMBOK™ KBase Tool.

# Where is KM Going?



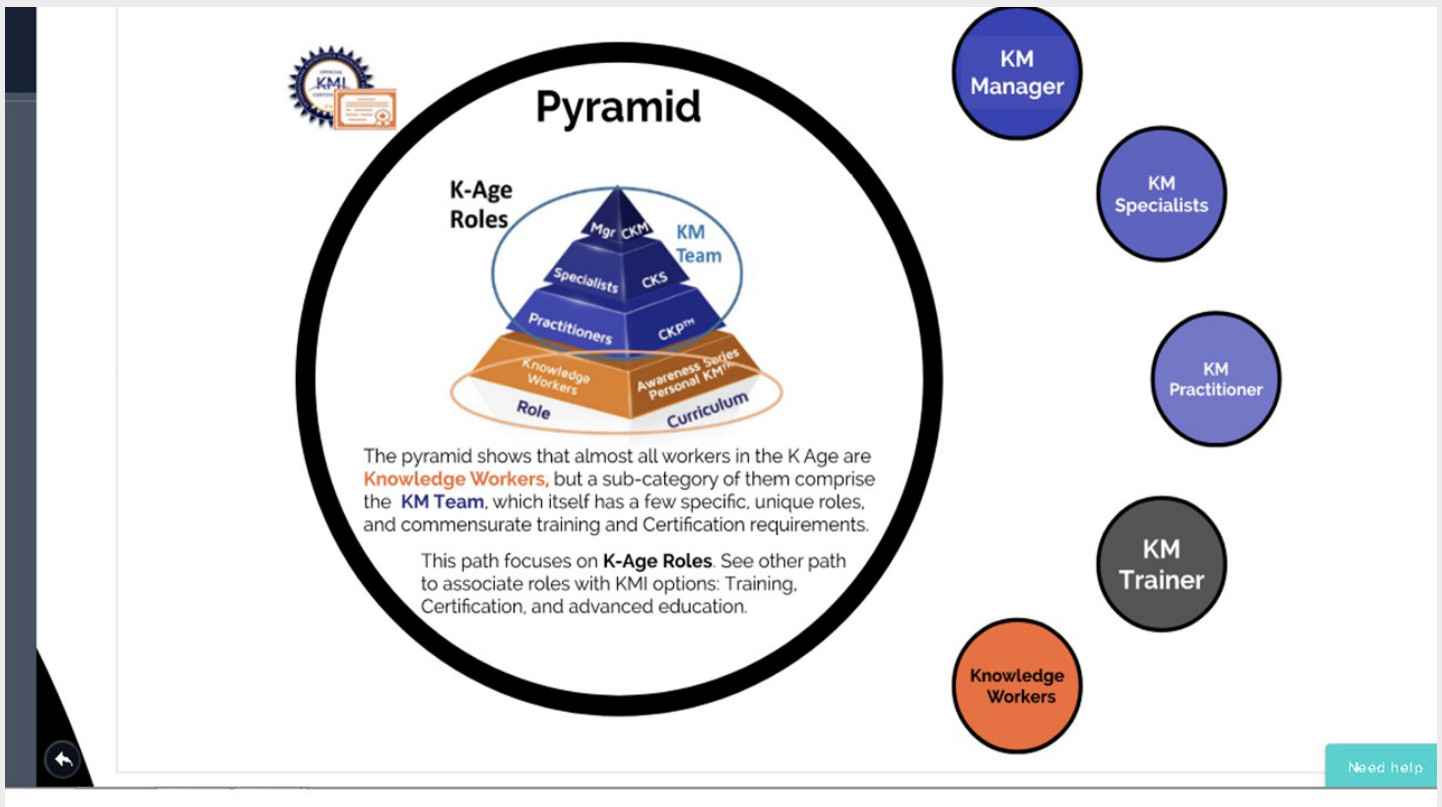
**Graph 4.** Training/Certification Curriculum by K-Age Roles in KMBOK™ KBase Tool.

Example: user can drill down to the role of the CKO, or other KM team designations/roles.

Thread icons are often helpful as well. See Training/Certification icon in upper, left-hand side. An icon in the lower, left-hand corner is possible and desirable, if it adds clarity to the sub-thread being followed – think crumb lines in traditional training courses.

Knowing roles, another thread in Graph 4. above, is KM Team Certifications – the third planet of five.

# Where is KM Going?



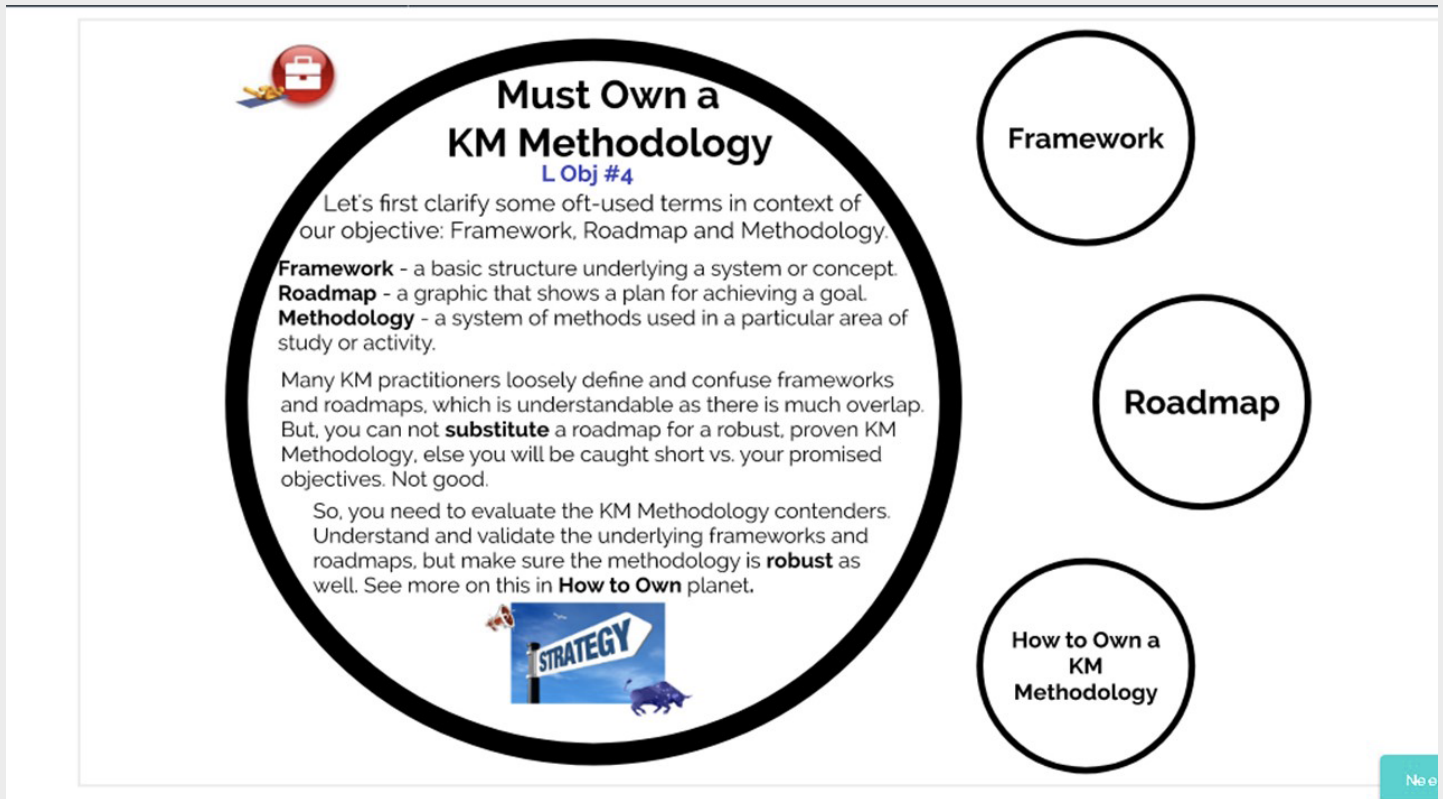
**Graph 5.** Another Graphic View of K-Age Roles in KMBOK™ KBase Tool.

In conclusion, to be much more helpful, and to fulfill an ultimate KM objective which is to get the best knowledge to the right person at the right time, KBase will become inevitable, the tool that truly enables Performance Support.

**2) KM Methodology** – I predict we will move from ad-hoc frameworks and roadmaps, suitable for executive briefings and calls to action, to very robust KM Methodologies, which will become a requisite for successful KM.

If you had a process-based KBase, it might look like this concerning clarifying the various representations of the KM process Frameworks, Roadmaps and Methodologies.

# Where is KM Going?



Graph 6. A View of KM Methodology Components in KMBOK™ KBase Tool.

# Where is KM Going?

**Framework**  
A basic structure underlying a system or concept. Here's two examples.

This KM Methodology graphic could be used to describe the concept of five phases with an iterative feedback loop. An expert could even describe some of the intended activities in each phase.

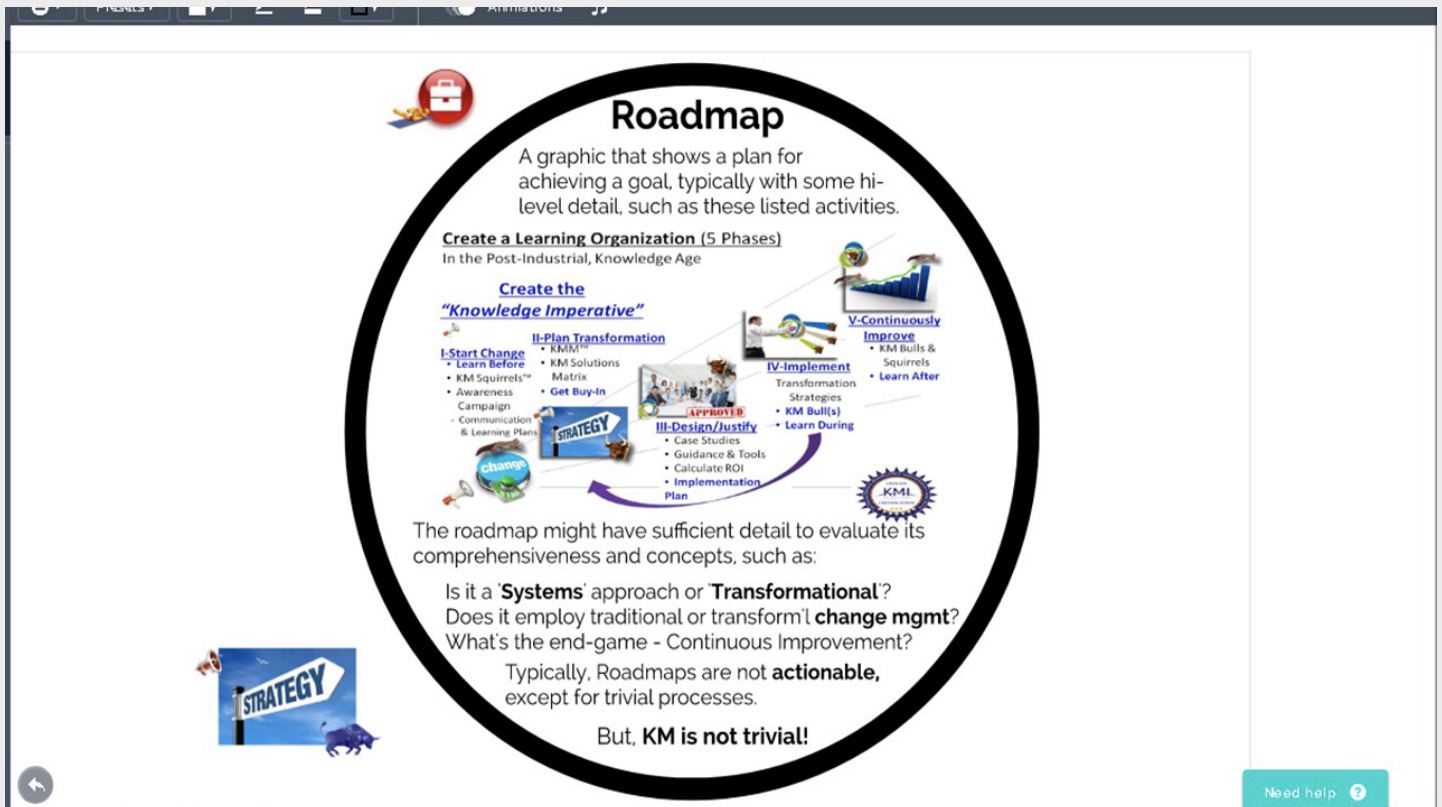
The K Maturity Model (KMM)™ uses a spiral metaphor to depict climbing toward an ultimate objective - Learning Organization. It even includes some Phase-level objectives, which could be encroaching on roadmap status.

Obviously, neither is **actionable** as depicted.

Need help ?

Graph 7. The Graphic View of Frameworks in the KMBOK™ KBase Tool.

# Where is KM Going?



Graph 8. The Graphic View of Roadmaps in the KMBOK™ KBase Tool.

In addition to understanding the diverse uses of frameworks, roadmaps and methodologies, an even more important issue are the biases of today's alternative KM Methodologies. The primary KM methodologies being actually used are what I call "KM (as a) System Approaches." Let's understand why such methodologies are very popular, and why they have had mediocre success.

In my early days as a KM consultant, late 1990s, I was hard pressed to sell enough personal billable hours to justify my employment. Much of my work was to complement information technology presentations with KM briefings.

Such nominal, mostly non-consulting (marketing) efforts resulted in two outcomes.

- A few contracts were won based on our emphasis on KM compared to the more traditional IT consultancies. One such win was a \$325 million contract with NASA, where the contracting officer complemented us on our response to their contract requirement for innovative solutions, which of course KM enabled.

# Where is KM Going?

- But, more fundamentally, the spear metaphor applied. Specifically, a KM consultant provided a good inroad into a client—the spear point. But the consultancy’s financial benefit, the shaft of the spear, was the big follow on IT contract that often followed. So, it is not hard to understand why KM has been very IT oriented, i.e., originally enterprise systems such as repositories. Also, the most successful KM vendors in the early days-and even today, were those focused on enterprise-level systems.

My second KM Methodology prediction is not only that future KM methodologies will become much more rigorous, with proven evidence-based methods, but also the existing bias toward KM Systems Approach will phase out in favor of a much more transformational KM Methodology. See Prediction #6.

**3) KM Maturity Models** – I predict robust KM Methodologies will enable us to move from ad-hoc, traditional maturity models to evidence-based, predictive models, that are not just typical assessment tools (diagnostics), but will likely be powerful, prescriptive tools as well.

Here’s a quick primer on maturity models: They were popularized in the late 1990s by the Software Engineering Institute’s – Capability Maturity Model (CMM)<sup>®</sup>. The United States government needed a

way to pre-screen the hundreds of vendors that would compete on huge IT contracts. Why? Many just weren’t qualified, no matter how elegant their proposal, to successfully execute the contract terms. Hence, the CMM<sup>®</sup> was an assessment focused primarily on consistency of process performance. It became a way to weed out those vendors which had a relatively high likelihood of failure.

Because of the CMM<sup>®</sup> popularity, there was a burst of efforts in 1999 to develop a similar Maturity Model for KM. Examples: KM Maturity Model (KMMM)<sup>®</sup> by Siemens AG, KM Landscape by Microsoft, and my Knowledge Maturity Model (KMM)<sup>™</sup>, now an asset of the KM Institute. Quite frankly, most of the early maturity models were weak examples of what might be possible if the basis for each assessment was evidence-based vs. ad hoc.

But, in addition, consider going to the doctor’s office to get a checkup. What if the doctor said here’s what’s wrong with you (diagnosis). Come back and see me next year. Would you be satisfied to have a diagnosis with no curative prescription? Probably not. Then why would we assess our own organizations if we couldn’t simultaneously provide a prescription for continued good health?

By 2010, I believed we needed a tool that wasn’t just an assessment (diagnostic), but could be enriched by the KM Methodology to provide a prescription as well.

Here is what it looks like. Importantly, it doesn’t merely address the health of KM, but other threads critical to overall health and prosperity that can be improved through KM and other evidence-based prescriptions.

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## KM Transformation Solution™ Knowledge Maturity Model (KMM)™





# Where is KM Going?

It is not obvious from the spiral graphic-like roadmap, but there are a number of actionable threads being evaluated. For each thread at each level, one or more questions are asked. The answers are on a five-point Likert scale.


The multiple threads are determined by deciding on the most critical concerns of the organization under study. Barring such specific knowledge, the most important concerns for all organizations are in the generic model, which include: human capital, customer satisfaction, Innovation, analytics, KM and transformational change management.

Here's a Level I assessment (aka diagnosis). It is comprised of assessment questions on each of the many included and concurrent threads. (See slide #1.) The assessment questions are followed by some summary, Level One Principles, in this case v-v the specific human capital thread. (See slide #2.)

For Slide #3, some additional hi-level guidance is provided on way forward. The human capital thread commensurate high-level prescription. To be actionable, the prescriptions need to be evidence-based, and be much more granular and precise.

Slide #1. Level One assessment questions. Slide #2. Level One Principles.

**KM Institute's -- Knowledge Maturity Model (KMM)™**  
Diagnostic Questions by Level – **1. Initial**




**1. Strongly Disagree**   **2. Disagree**   **3. Neither Agree nor Disagree**   **4. Agree**   **5. Strongly Agree**

<b>1.a.</b> Our employees know what is <b>expected</b> of them.	<u>  #  </u>
<b>1.b.</b> Our employees have the facilities, materials and IT tools <b>to do their work right.</b>	<u>      </u>
1.c. We have seen <b>positive response</b> by many employees who find the post-industrial, Knowledge Age to be <b>compelling.</b>	<u>      </u>
1.d. We have a <b>cadre of employees</b> - excited to be personally involved in specific KM activities, possibly to be <b>PKMers.</b>	<u>      </u>
1.e. Our emerging <b>KM Team</b> understands KM, especially the need for early change management.	<u>      </u>
1.f. Your organization's employees would claim, <i>"We have relevant, accurate, timely <b>data</b>-are expected to make fact-based decisions."</i>	<u>      </u>

**Caution: Earlier KMM™ version. Only use as example.**

# Where is KM Going?

## Level One – “Initial” Principles



Principles

- If you can't incite enthusiasm and engagement at these minimal levels, how can you expect to be successful with major strategic initiatives to 'Create a Learning Organization'?
- Re-evaluate your team's traits, skills and competencies and the sufficiency of your preparatory training.

**Caution: Earlier KMM™ version. Only use as example.**

## Level One – “Initial” Way Forward

If KM Team is voluntary vs. funded, pay particular attention to concept of 'quick wins'. If funded, you have the luxury to focus some initial effort on **planning** and more rigorous **pre-kickoff training**, but don't ignore 'quick wins' (aka KM Squirrels™).



Minimal startup roles include those specified as learning objectives in the Certified Knowledge Practitioner (CKP)™ Program (or equivalent).

Remember carpenter's planning axiom, measure twice, cut once. Enriched roles include those specified in the Certified Knowledge Manager (CKM) Program, or equivalent, which ultimately has a more strategic and leadership objective. These skills will be required to attain maturity level 3 - Imperative (Get Buy-In). But, even more importantly, don't think that because you have the luxury of funding it will last, i.e., 'quick wins' are still the primary, tangible early objective.

**Caution: Earlier KMM™ version. Only use as example.**

# Where is KM Going?

## Level One – “Initial” Prescriptions

If **1.a.** or **1.b.** do not have high scores (>4.0), your organization has some very fundamental issues with the enactment of modern human resource (HR) policies to promote engagement. Or, your organization lacks sufficient infrastructure investments to motivate and retain employees. You need early alignment with HR to simultaneously engage employees and train them concerning the impact of the emerging K Age on them and their career aspirations. If Level One scores are weak, you should consider early implementation of Personal Knowledge Management (PKMgmt) as a strategic initiative (KM Bull).

If **1.a.** or **1.b.** are weak you need to ensure early and concurrent Human Resource efforts in parallel to specific KM and change management tactics.

**Caution: Earlier KMM™ version. Only use as example.**

**Note:** Some terms are unique metaphors used in the KM Institute certification training, such as KM Squirrels (essential, transformational quick wins focusing on knowledge-intensive activities), and KM Bulls (strategic KM initiatives such as repositories, CoPs, etc.).

Obviously, without a robust KM Methodology, especially v-v HR in above example (Questions 1a. and 1b., and Slides #2 - 4 above), the high-level prescription couldn't be parsed into the many diverse recommended activities, such as: get alignment and buy-in from HR; define ways to substantially improve engagement, develop a relevant KM training curricula, and the specific details on how to implement a Personal Knowledge Manager (PKM)<sup>™</sup> certification strategy to improve personal performance in the Knowledge Age.

**4) Defined KM Competency Areas** – I predict KM will mature from ill-defined, uncatalogued, and disparate KM efforts to defined KM competency areas. This will enable the development of university curricula, and a way to begin to meaningfully organize the many already-proven KM Initiatives into a viable discipline.

Many universities around the world have attempted to establish KM departments since the late 1990s. Many have, in my opinion, faltered for a number of reasons, including: 1) low numbers of potential students in the early years; 2) lack of instructors with diverse KM experience; and, 3) weak programs, certainly not of the rigor of established disciplines such as traditional MBAs might teach.

# Where is KM Going?

The noticeable press for better university programs started in about 2010, when the KM Education Forum (KMEF) was established by Kent State's KM Program, headed by Dr. Denise Bedford, now at Georgetown University. George Washington University (Washington DC), was represented by Dr. Annie Green.

The goals were traditional for universities and the KM Institute; namely, to first define KM Roles, which included Knowledge Managers, Specialists and Practitioners and Workers. Then, to define the skills and competencies required to perform those roles in the Knowledge Age. Once having defined roles and skills, competency areas follow and enable universities to create courses toward recognized diplomas, and for training firms to create training programs to enable rigorous and applicable certification levels.

Here are the Competency Areas that derived from much work by leading universities seeking to establish their own KM programs, and as customized by the KM Institute for its certification programs.

## **KM410 Series: Transformational Leadership & Strategy.**

Transformational Leadership & Strategy is about: KM Frameworks, Roadmaps, KM Methodologies, Governance, Modern Maturity Models, and especially the KM Transformational Solutions, and more.

**Enterprise Innovation** – This is a major transformation leadership sub-competency area. It includes tactical and enterprise continuous improvement methods, culture, and technology as well.

## **KM420 Series: Knowledge Assessment & Evaluation.**

Knowledge Assessment & Evaluation is about: Audits, Evidence-Based Analytics, KM Metrics, and more.

Also, complies with emerging standards for ISO 9001:2015 - standards for K Audits.

## **KM430 Series: Culture & Communications.**

Culture & Communications is about: Traditional Change Management (e.g., Awareness Campaign: Communication Plan & Learning Plan), Personal Knowledge Management (PKMgmt), and more.

Also, complies with emerging standards for ISO 9001:2015 - standards for Cultural Change Mgmt.

## **KM440 Series: Collaboration & Communities.**

Collaboration and Communities is about: K Sharing methods and optimization of social media tools such as: Expert Locators, Communities of Practice (CoPs), Social Network Analysis (SNA), and more.

# Where is KM Going?

## **KM450 Series: Knowledge Asset Management.**

Knowledge Asset Management is about: Knowledge Repositories, Taxonomy, Search, and more. See also KM495 Series: Knowledge Architecture.

Also, complies with emerging standards for ISO 9001:2015 - standards for K asset management.

## **KM460 Series: Intellectual Capital Management.**

Intellectual Capital Management is about: K Capture, K Transfer and Retention, and more.

## **KM470 Series: Organizational Learning.**

Organizational Learning is about: Performance Support, Rethink Learning (methods & technologies), and more.

## **KM480 Series: K-Embedded Business Operations.**

K-Embedded Business Operations is about: Lessons Learned and Best Practice Management Processes, Customer Satisfaction, Process Management in the K Age (“Connect & Collect”), and more.

## **KM490 Series: Knowledge Technologies.**

Knowledge Technologies is about: Hard Disciplines – Build Apps, Deliver Technology Solutions, and more.

For a more detailed description of each Competency Area, see our website: <https://kminstitute.org>

I predict the KM industry will become much better organized, essentially becoming a discipline in the traditional, academic sense – actual KM degree programs in many universities and certification programs from proven commercial trainers. But, to become a respected discipline, KM will need robust methodologies and many more documented successes. In addition, in my opinion, KM will need to morph from a traditional discipline to a transformative one (#5 below), and from a technology focus to a clear emphasis on human capital (#6 below)..

5) **KM as a Transformational Discipline** – I predict we will begin to consider KM as not just another improvement discipline (TQM, BPR, Agile, etc.), but in fact the major enabler of the requisite transformation necessary to operate effectively, and to be sustainable as a viable organization in what will be a very competitive, global Knowledge Age.

# Where is KM Going?

When I first started thinking of KM as transformative vs. just a discipline – early 2000s, I got major pushback. The resistance was particularly strident and understandably so, since many KMers were mostly fascinated with KM technology. I was downplaying technology by that time, as being closer to a commodity than the disruptive technologies and methods such as KM itself.

But, experienced change management experts who thought their discipline could cover all types of changes, found the transformative change management approach to be foreign to them. Ironically, many change experts were fearful of the transformative change emphasis, or arrogant--especially about its implications for their traditional change management discipline. Here is an occasional challenge I get in KM Certification Program workshops, “I’m already a certified Change Manager. Your KM Certification touts much about change management, but what can you possibly teach me that I don’t already know?” Here’s the answer.

**Transformational Change Management (TCM)**– There are many major differences between traditional CM and transformational CM. (Some might consider this an oversimplification, but it details the major differences between the two, of which there are many.

**Traditional Change Management** has a number of primary activities – five primary ones according to a Prosci study in 2011 - *Which CM levers do practitioners typically use?* (Prosci is an established change management trainer.) The primary activities include a Communications Plan (88%) and a Training Plan (76%). Sometimes both are combined and logically dubbed an ‘Awareness Campaign’. Three other activities were only minor, in the 10 – 26% range of usage.

Consider how a traditional change management program might be launched for a typical KM technology solution – perhaps a portal-type repository or other enterprise-level system, maybe social media that supports communities of practice and an expert locator.

- **Traditional Communications Plan** – Once the portal was decided upon, the CM Team would start the design of a communications plan. The plan might be implemented either immediately, or closer to the actual system installation, depending on the timing gap between CM kickoff and planned implementation date. Communication initiatives can vary widely and may include announcement speeches often done by key executives, and other announcements such as Newsletters and always updates, etc., but does not include formal training.

- **Traditional Training Plan** – Today, it is more typically called a Learning Plan, but the details are the same and quite obvious. The Learning Plan focuses on getting the folks who will be using the new system well trained before implementation. Timing is obviously a key issue as is adequate competence on the new system.

**Transformational Change Management** is probably best defined in John Kotter’s series of books on change, which he started writing in the 1990s. (See source list of Kotter’s books at the end of this chapter.)

# Where is KM Going?

- **Transformational Communications Plan** – The key communication differences compared to the traditional CM are in the critical need for much actual and personal top management involvement. The KM Team, in conjunction and coordination with top management must create a communications plan that includes at least the following much more demanding needs than traditional CM. Specifically, these additional activities include: a motivating ‘Call to Action’; the need to create a ‘Sense of Urgency’ to accelerate action, and a “clear, compelling vision” as specific guidance; and finally, how to overcome resistors, often called ‘Get Buy In’.

- **Transformational Learning Plan** – In addition to specific training related to any early KM Initiatives, Transformational CM requires much more extensive training to educate all employees on the major disruptions being faced by our economy, how to overcome organizational complacency, and the desirability and feasibility of the new Knowledge-Age vision. In addition, I predict a whole class of certification courses focused on making marginally engaged knowledge workers into fully engaged, high-performing Personal Knowledge Managers (PKM)<sup>TM</sup>. This human capital prediction is covered next.

6) **Human Capital vs. Technology Focus** – Finally, I predict major changes in KM focus, with an increasing migration from primarily technology-focused solutions, e.g., the KM Systems Approach as a methodology described above, to a much-needed focus on increasing human motivations and performance in the Knowledge Age. Humans will become the ultimate center of gravity for KM going forward, not technology. The gap between existing technology capability and what is essential to KM is small, compared to the gap between existing human performance and ultimate human potential in the Knowledge Age. (See source list on the whole host of diverse personal knowledge management books at the end of this chapter.)

There has been much, very convincing research insight and conclusions in the last twenty years by the Gallup Organization and others. This branch of human capital research focuses on human engagement on the job. In general, humans across all job categories and nationalities around the world are only marginally engaged on the job. Typical results are max 25 – 30% engaged. Organizations with much higher levels of engagement inevitably beat the competition.

Fortunately, the Gallup organization not only uncovered very elegant ways to determine average engagement levels in an organization—an assessment tool of just twelve questions, but those questions have potentially, reasonably prescriptive outcomes as well. The Gallup human capital research diagnostic and prescriptive guidance has been incorporated into the Knowledge Maturity Model (KMM)<sup>TM</sup> described in #3 above.

## Conclusion

Six bold predictions have been made and justified. Here they are in summary:

1) There will no doubt be an eventual shift from traditional repositories for content management to much more granular knowledge, housed in process-oriented **knowledge bases (KBases)**. That is, unless artificial intelligence accelerates rapidly and is applied to this ubiquitous KM need – to get the best knowledge to the right person at the right time. I see a deep need right now, proven by call center operations and the rapid automation of all manner of decision support systems, but for very limited, tightly defined applications.

# Where is KM Going?

2) More robust **KM Methodologies** will soon emerge. They will replace the ad hoc frameworks and roadmaps that are insufficient for complex methodologies and process methods. Such KBases (with KM methodologies) will substantially improve KM performance, as well as the performance of all types of complex processes (process KBases), especially those with high turnover and steep learning curves, especially those processes that need quick access to in-depth knowledge to make decisions or solve problems.

3) The next generation of **diagnostic and prescriptive maturity models**, already available, will soon gain a foothold as powerful, evidence-based business improvement tools.

4) **Competency Area** definitions (including scope of roles and associated learning objectives) of KM will soon reach a reasonable consensus. This will accelerate university course and programs creation toward KM, especially an MBA in KM. The role of Chief Knowledge Officer (CKO), especially if leading an organizational transformation, cries out for a rigorous MBA in KM.

But, such programs must be at a reasonable, cost-justified price and have above average convenience, considering the concurrent workload of a CKO. Most traditional universities will have proven to have trouble with the traditional marketplace, including price competition, product offering and convenience.

Considering my personal experiences, perspectives, and even potential prejudices, I somewhat cautiously predict there will soon be a major disruption in the academic marketplace in general and in KM programs in particular.

A unique MBA in KM may be amongst the first disruptors as the Master CKM certification (**MCKM**) converges on and even overlaps the ideas, philosophies and content of the traditional MBA. Except, certification programs have one major competitive advantage for practitioners – a major focus on being able to do, not just to understand. Keep an eye on the KM academic community and marketplace.

5) **KM as Transformation** – KM as not just another improvement discipline, it is the natural response to the current episodic shift in human occupations, which itself is prompted by substantial automation potential of most all means of menial, repetitive work in all quarters. Today, this is no longer speculative. General purpose robots operate at lower per hour costs than cheap Chinese labor. So, consider this--are future factories going to be built in remote regions with just low-cost labor, or are a new class of Knowledge-Age executives, with transformational intentions, going to seek regions with both an educated, highly motivated work force--that can leverage low-cost computers and production and delivery innovations (make and move) to be price and quality competitive anywhere?

And finally . . .



# Where is KM Going?

6) **Human Capital must be KM Focus not KM Systems** – For historic, developed-country life styles and wealth creation to survive well into the 21st century, humans must focus on the well-documented gap in human performance--between past performance and actual human potential. High-performance humans, partnered with robots, drones and artificial intelligence (AI), will be much more than competitive with production anywhere. This focus might very well be the future of innovation.

So, Nancy Dixon and I converge at one similar ultimate destination – **Innovation**. However, our approach differs. She is about improving innovation through more structured conversation. I agree that much can be improved with new and better conversation techniques, such as the kind of proven conversations that best transfer knowledge from retiring experts to their successors/ (See John Hovell on KM Institute site.) And, of course better brainstorming, café and Knowledge Jam techniques are very helpful. (See Kate Pugh on KM Institute site.)

However, I predict such conversational techniques will be literally dwarfed, maybe even by an order of magnitude, by the potential improvements to be gained when we focus on our emerging understanding of human motivations and passions. If this understanding can be exploited and leveraged with the knowledge to optimally combine that improved, highly motivated performance with emerging robots, drones and AI.

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**About the Author** - Douglas Weidner is a respected KM trainer, consultant, columnist, conference speaker and mentor. Douglas developed the internationally acclaimed Certified Knowledge Manager (CKM) and Master CKM Certification Programs, based on his KM consulting and training experiences.

He first taught the CKM in June 2001 and through KM Institute, has conducted training for well over 8,000 Certificants worldwide. He has trained, certified and advised KM leaders in most every U.S. Government Agency and all major U.S. military services and joint combatant commands, non-governmental organizations, and over one thousand commercial firms worldwide. His focus is on developing KM Institute's Knowledge Maturity Model (KMM™), the KM Transformation Solution™ and on expanding KMI's worldwide KM Certification offerings.

Douglas is an engineering graduate of the US Air Force Academy--MBA in Business Economics (UCLA), MSIE in Operations Research.